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ABSTRACT

This document applies theories of participatory management to a proposal for a model that uses a team approach to staffing university library reference centers. In particular, the Ward Edwards Library at Central Missouri State University is examined in terms of the advantages and disadvantages of its current approach. Special attention is given to the group dynamics aspects of the building of reference teams, to the logistics of scheduling with rotations and substitutions, and to the responsibilities of a team leader. The report suggests that team building would ensure more flexible and equitable scheduling, define supervisory responsibilities rather than leave them ambiguous and impede decision-making and coordination of activity, reduce reference "fatigue," and improve harmony and communication among staff members. All these conditions would ultimately benefit the clientele. (BEW)

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TEAM APPROACH TO STAFFING THE REFERENCE CENTER: A SPECULATION

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ABSTRACT

Participatory management or team management have prompted a plethora of library discussion in the recent past. However, no articles appear which discuss the formulation of building teams to increase productivity and provide better service to clients. The authors have developed a model for using teams to staff the Reference Center at a university Reference/Information Center. The purpose of this new approach is to provide better service, define supervisory responsibilities, improve worker relations, reduce fatigue and improve communication between all staff members.

TEAM APPROACH TO STAFFING THE REFERENCE CENTER: A SPECULATION

The concept of team participation receives idealistic lip service as a representation of harmony and efficiency. Thomas R. Horton writes

> There are many human endeavors that are best entrusted to a single creative individual - but getting things done through organizations is not among them. Instead, teamwork is needed, and so is delegation.[1]

Teamwork that exists between reference personnel is not the same as a team. Teamwork exists in such library areas as reference, but teams are another matter. Teams working reference might improve service. They would consist of both librarians and paraprofessionals who work together on a scheduled, proprietary time.

However, there are questions about a library reference team's practicality and whether it brings improvement over the existing means of work.

Current Reference Center Staffing at Central Missouri State University

The staff at Central Missouri State University's Ward Edwards Library may one day work or manage reference teams. Central Missouri State University (CMSU) is a mid-size state university with an enrollment of approximately 12,000 students. The Ward Edwards Library serves the students, staff, faculty and general public with a full-time staff of approximately forty, fourteen of which are library faculty --

six in Technical Services and eight in Public Services.

Before the summer of 1989 Ward Edwards Library was a subject-divided library. At that time the library was reorganized into a centralized library, which included a new Reference Center on the main floor. Near the Reference Center was a bank of online catalog terminals, CD-ROM stations with nearly twenty database products, most of the paper indexes, and the entire print library reference collection.

Since the reorganization, the Reference Center has undergone several changes in the way that it is staffed. At first most reference librarians and library assistants worked at least twenty hours per week. Now that has become twelve to fifteen hours per week, depending on a person's other assignments.

In the beginning the Center had for the most of the day an abundance of staff (sometimes as many as five), and until 1992 library faculty could excuse themselves from duty at the Center for a liberal variety of reasons. New rules have reduced absenteeism, but the flexibility that was intended to be present has suffered.

At least two workers are scheduled at any one time, and more than two are scheduled during the "peak" hours of 9 a.m. to 4 p.m. Duties involve all levels of reference service from instruction in the use of the online catalog and CD-

ROMs to general reference work. Workers also collect Interlibrary Loan requests, distribute Interlibrary Loan orders, and answer telephone requests. (Until March of 1993 the Reference Center was also in charge of receiving and sending FAX messages.)

The pool of human resources comes from both the public and the technical services areas of the library. Librarians and paraprofessionals are scheduled daily at the Center, Monday through Friday. All professionals and paraprofessionals work at reference some time, but their job requirements determine the proportion of their duty hours. For public service workers this may amount to over a third of their daily work time. Amid this group most public service librarians and support staff work twelve to fifteen hours per week at the Center, while selected technical services personnel work an average of five hours per week during fall and spring semesters.

Advantages to Current Staffing Approach

There are positive aspects to the current scheduling procedure. At Central Missouri State University the Coordinator of Public Services develops the schedule for staffing the Reference Center, and since it remains the same for a full semester, one can make plans around one's existing schedule for this time.

Another positive aspect is the rotation of the work time

slots. The assignee of a particular time slot for that semester will, for the next semester, move to the next slot. For example, a duty of 8:00 to 9:30 a.m. and 1:00 to 2:30 p.m. one semester may become 9:30 to 11:00 a.m. and 2:30 to 4:00 p.m. for the next. This rotation equalizes any perception of the "worst" or the "best" time slots, since eventually everyone will work during all of the time slots. Also, schedules for future semesters are fixed and predictable.

Disadvantages to Current Staffing Approach

At CMSU reference duty is of paramount importance and is treated as if each library faculty is a classroom instructor whose time at the Reference Center is a scheduled class meeting. To allow for absences requires finding a substitute.

Unless attending the Annual Missouri Library Association Conference, or either the Annual or Mid-Winter American Library Association Conference, a faculty member who wishes to go to a meeting must arrange for a substitute. This is also required for attendance at a departmental, college, or university committees, or when taking a class. For vacation and "comp" (for compensation) times no substitute is required when the Coordinator of Public Services has been notified at least three days in advance. Sick leave requires a substitute only if it is a non-emergency medical appointment.

Working from one to three hours a day, some workers have both morning and afternoon shifts, which can complicate scheduling appointments and reduce flexibility. Difficulties result chiefly from attending meetings, which perforate most days. Faculty must constantly consult personal calendars and re-schedule appointments in an effort to avoid conflict.

Another problem is the supervision and management at the Reference Center. For example, the Coordinator of Public Services tries to "come around" as often as possible, but this does not occur enough for satisfactory evaluation of the Reference Center personnel. Since all library faculty members are evaluated each year, little documented evidence can be presented about the work done at the Reference Center, even though it constitutes about one-third of a Public Services faculty's workload.

Since no single individual is officially in charge of daily activities at the Reference Center, the problem with inter-communication is greater. With the coming and going of scheduled workers, small, but important, aspects of providing service may fall through the cracks. For instance, a class is working on an assignment and a worker going off-shift forgets to inform a replacement. Or a client leaves a paper message that is lost in the shuffle of activities. Even though a Daily Information Sheet records information for all workers, such episodes continue to take place and create

problems.

Team Approach to Staffing Reference Center

In the fall of 1992 a Reference Center Task Force was created to suggest improvements to Reference Center service. Several ideas were developed. One was that each day a fixed group of people should staff the Reference Center. By chance the word "team" was applied to this group, and from this evolved a concept of "team" -- a group of the same people working together for the same purpose.

Initially, team units were designed chiefly to solve the problem of scheduling people. To see that everyone served equally at reference, groups were assigned their own block of time. A leader was introduced to give direction and accountability for the staffing. In formulating this concept, the originators had no previous library model by which to go. However, models already exist in business.

In the business world "team" is the buzzword that seems to be used the most these days. Over eighty percent of all U.S. business organizations with one hundred or more employees, utilize a portion of their employees as working teams.[2] According to Tom Brown the idea of organizations building teams at every possible level is not a concept that is going away in the near future. The team concept that is now common in the United States probably began with the incorporation of the Japanese quality circle work ethic.[3] In

the area of librarianship the concept of quality circles has been around for some time. In their 1983 article in the Journal of Academic Librarianship, Martell and Tyson define quality circles as ". . . small groups of employees who meet voluntarily, usually on a weekly basis, to learn and to apply techniques for identifying, analyzing, and solving problems affecting their work or workplace."[4]

Basically, this work concept made use of the employees mental and physical capabilities. Rensis Likert expounded on this in his book, New Patterns of Management, when he stated that the new worker was better educated that those of the past and desired to participate in the managerial process.[5]

This is related to the concept of participatory management, a subject that has prompted an abundance of library material over the past two decades. However, no articles can be found in Library Literature or ERIC about teams formulated to provide better service or to increase productivity in libraries at the lowest decision-making level.

In libraries a business team approach should improve the existing way of performing tasks, both in public services and technical services. Teams can be adapted to such daily services as answering reference questions. They are confined to specific responsibilities, and they do not go beyond them to become a de facto management level that makes

administrative decisions for a library. Instead, they implement decisions, usually with the guidance of their leader.

In business such a group might be described as a self-directed work team. Richard S. Wellins states that a self-directed team makes optimum use of man-power in everyday situations. Members "typically handle job assignments, plan and schedule work, make production-related decisions, and take action on problems."[6]

The self-directed team might be one of the best ways for providing excellent reference service to clients in academia. Under this approach the members would make decisions on anything they come into direct contact with. This includes the staffing schedule, problems that arise between team members, and increasing efficient service to clients. Increased flexibility is the key to its success.

Reference Team Formulation

Once the decision has been made to adopt the team approach, the work of transition begins. Leaders must be chosen, then teams of both librarians and paraprofessionals must be set up. Of the approximately twenty people who make up the reference pool, virtually everyone has worked with everyone else in the past, so the association together in fixed groups should not be traumatic.

Possibly, the groups would follow Brown's description of

team formation. Writing of businesses he states that general teamwork in any organization will go through four stages of growth -- form, storm, norm and perform. The group must be placed together in a team (form), work out the difficulties that will exist when people of different behaviors and expectations are thrust together (storm), realize why the teamwork is better than individualism and begin to establish procedures of operation (norm), and finally, the team will merge together to work towards a common goal (perform).[7] After a team is formed physically, it must be prepared psychologically. Interdependence is a key psychological factor within the team concept. By definition teams work together, and to do this successfully they must be disciplined and harmonious. Workers in the same department and performing the same tasks are not, by these interactions, a team. They are not working in an intensely dependent arrangement in the way that, say, mountain climbers must work together. Librarianship, at most, substitutes symbolic interdependence for the literal.

To establish group cohesion there must be both inner and outer forces cemented by the pursuit of a shared goal, service to clients. The inner is fueled by trust, reliance, and good will between co-workers, the outer by stress in the form of requests.

Clients are the outsiders to the workers as insiders.

Serving clients provides useful stress by focusing a team's energy and encouraging its cooperation. By implicitly evaluating the success or failure of the service they receive, clients intensify stress. Stress is one source that energizes workers to help clients in their objective. In general, motivation to do a better job is established through personal aspiration and organizational expectations, but a team approach uniquely augments this by the inducement not to let down the team. Individual job pride is naturally shared with one's group. This is provided the members see themselves as a team and not a disparate group.

Assigning Reference Center responsibilities to teams produces group identities and group values. Any group of people working together has its own character due to the idiosyncracies of each team member and the style of management of the leader. A team concept cultivates this. Teams could also be built through rivalry with other teams, which present a standard to excel. And to enlarge their uniqueness and sense of rivalry teams could assign themselves names, as sports teams do.

Teams do not happen. They must be planned and worked toward. There are threats to them. A team identity can be jeopardized by a high turnover or substitution rate. Size of a team plays a role in fomenting effectiveness. Too many or too few people are undesirable from both a work area point of

view and a client-to-worker ratio. When workers are not kept busy morale is threatened, so team spirit is weakened. Teams are built through action, not leisure. However, when too many activities overwhelm workers, clients are not served, no matter what the quality of the team.

Tom Brown offers four circumstances that can disintegrate a team quickly. These are

1. When teams have fuzzy roles and responsibilities.
2. When team members are torn by diffused priorities.
3. When members mis-communicate or mishandle conflict.
4. When members display disruptive personal styles.[8]

Similarly, Fernando P. Flores offers three reasons why teams fail. First, the lines of communication have broken. Second, there are too many different theories of management that are nullifying each other. Last, members of the team lack leadership skills and cannot function without "their" leader.[9] In the library team model envisioned, none of these reasons appear to threaten its well-being. Historically, people at the Reference Center have worked together in short-term groups. A team approach should sharpen such areas as perceived responsibilities and harmonious conduct. Whether this proves true in practice is yet to be decided.

Reference Team Scheduling

How does the team concept solve or mitigate the problems of staffing, continuity of intelligence, and management? The

issue that began it all is staffing. Assigned time blocks for each weekday, teams will be drawn from the current group of some twenty workers, which will yield five four-person teams.

Out of the four people one, designated as the team leader, will supervise the team. On average two people will be on duty, and this can be reduced in slack times or augmented during busy spells.

Each team will staff the Reference Center for eight hours a week as either one full day or two half-days. This will usually be from 8:00 - 4:00, which occupies most of a day's reference activity. Since some weekdays are traditionally busier, a rotating schedule ought to be placed into effect so that each team will eventually and equally work each day of the week. Another reason for rotation is Fridays; they are popular as vacations, so some staff members prefer not to work every Friday. Students also have schedules that they must work around, and some have certain days or hours they are free to visit the library. If they visit at the same time each day, under a non-rotating system they are helped by the same people. The team system would expose the student to different workers, who bring a continuous parade of strengths and weaknesses.

A team that worked an entire day has this schedule. If they worked Monday of Week #1, they would then staff the

Reference Center on Tuesday of Week #2, Wednesday of Week #3, and so on.

Alternatively, if each team worked two half-days -- for example, Tuesday 8-12 and Thursday 12-4 -- of week #1, then that same team would move "up" to Wednesday morning and Friday afternoon of week #2, Monday afternoon and Thursday morning of week #3, and so on. [See Figure 1]

Schedule Rotation for Each Team

Teams need to be kept fresh through new blood. At the end of the semester, teams should rotate so that they come under the direction of a new leader. For example, Team #1 moves under the direction of Team Leader #2, Team #2 shifts to Team Leader #3, and so on. When length of service runs out at the end of the semester, a leader's performance should be evaluated by teammates. With a new semester a team leader could rejoin the team as a member and a former member could become a team leader. More radically, at the end of the semester teams could be reshuffled so that each staff member will be allowed eventually to work with all other staff members.

The worst that can be said about the rotating system is that a team that works Friday might also work the following Monday, thereby encouraging reference fatigue. Also, a worker will likelier forget or misremember a rotating schedule.

Responsibilities of a Team Leader

A leader represents the administrative mainspring of a team. Instead of a group made of autonomous individuals with equal authority, an interdependent relationship is structured through an on-site manager. Within this simple hierarchy a leader has responsibilities beyond those defined for other teammates. A team leader works with a team to augment its strengths and pinpoint weaknesses. A successful leader is an evaluator, mentor, and coach. Beside dealing with the daily responsibilities, in these roles the leader builds morale, strengthens group efficiency, and troubleshoots.

Other workers come and go, but a team leader who is on duty the entire assigned time block is accessible, serves as a rallying point, and represents organization. Team workers know who can smooth out service to clients.

A team leader should be assigned from a pool of all librarians. Partly because all librarians serve as bibliographers and are required to work at the Reference Center, all librarians--and only librarians--are eligible for this duty. Willingness to serve is more of a factor than surpassing proficiency in reference knowledge. Any librarian must have the approval of the Coordinator of Public Services and, when from technical services, also the approval of the Coordinator of Technical Services. A leader's responsibilities are nested within that of the Coordinator of Public Services, who in turn is overseen by the Dean of Library Services.

Not everyone looks at such a position with envy. It requires commitment to responsibility and a willingness to be a manager. The goal is to make the Center work successfully overall.

A team leader has several management responsibilities. One is the arrangement of a suitable schedule that includes work breaks and provides for Reference Center coverage during illness, vacation and meetings. Another is ensuring the staff either appears for duty or finds a replacement, which allows for reciprocation at a later date. Theoretically, a team member who must be absent because of a meeting will find a substitute and then inform the team leader. However, the team leader may determine that the remaining portion of the team could cover the Reference Center without the need of a substitute.

In addition, a leader is responsible for ensuring that each member participates in any training sessions for new reference products or procedures. All leaders could meet on a regular basis to discuss issues about the Reference Center and the duties of team members. This takes the place of assembling everyone to discuss these issues.

At the end of each semester a team leader should carry out performance evaluations on teammates. In turn, team members evaluate their leader and their colleagues.

The scheduling arrangement that is true for workers is also true for the leader. No meetings or activities can be scheduled during work time. On the other hand, the rest of the week is free

from at-counter reference duties, and there will be no inconvenience of planning around reference "holes" in a work schedule. The most effective managers are those who receive the greatest amount of intelligence in order to make informed decisions. The degree of daily knowledge about reference operations is proportionate to reference efficiency. Among all team members, the leader will more likely have the greatest amount of operational information available. That is because co-workers know that they should refer to their leader management-level questions -- those that involve policy or procedural ambiguities, complaints, or any situation they feel uncomfortable about. Also, since a leader is more likely to be on duty longer than any member, a greater number of questions will be heard. And there is a greater incentive to keep informed because the job requires it. A leader ensures that all relevant information is communicated to whomever comes on duty.

The fewer people that handle a message, the less likely a distortion in meaning will occur either from misunderstanding or forgetfulness. The humor of communication distortion is acknowledged in the children's game of whispering from ear to ear a message that progressively alters. When a situation is not a game but for real, mis-communication causes real problems. The Center better serves its clients by minimizing information handlers.

Advantages of New Schedule to Team Members

In the new system a worker will be engaged at the Reference Center a lesser number of hours than is currently spread through a week. While this ties up one day or two half days, it frees four days from the cumbersomeness of navigating around time "holes." Such "holes" are represented by meetings, appointments, and the like.

By removing the reference time slots from each day and amassing them in more concentrated blocks of time, four out of five weekdays are freed. The harassing problem of finding a free period is substantially reduced, so missing a meeting because of reference duty or missing reference duty because of a scheduling conflict is less likely.

Working two half days or a single day shift rather than each week day has advantages beyond scheduling. When beginning reference duty there is always a transition from one's former type of concentration -- say compiling bibliographies -- to answering that first reference question. A rhythm and focus is developed that is evident in a revised behavior of working. With larger blocks of public service time, there are fewer occasions of psyching up for a transition.

A librarian working one single block of time benefits the client. For example, there are occasions when the same question is asked throughout the day, due either to a class assignment or some topical event, such as the Presidential election. When there is a scheduled turnover, passing on the answer of a recurrent

question may be overlooked, or following a pattern of reference assistance that renders no answer may be repeated several times. Whatever the result, with a changeover the answers (and the efforts that went into discovering them) are vulnerable to loss. By having workers on duty for longer periods, continuity strengthens the likelihood that an answer will be transmitted. Both workers and clients are the winners.

Reference workers cannot plan when clients come for help, and they have less control over client-interaction time than with any other type of duty activity. Distinct from non-people assignments, they cannot re-shuffle, defer, or ignore a client with a question or a request. When someone approaches, they must drop their current task.

Threat of Reference Fatigue

Another scheduling issue concerns the reference edge that may be jeopardized by both length of duty and the greater gaps between exercising one's reference responsibilities when work is not done each day of the week. It is possible that on a regular basis a week will go by before a worker goes to the Reference Center. As a result there may be a short-term atrophy of reference skills. Conversely, a span of inaction could bring a new freshness and energy to the reference worker.

The chief objection about congesting a week's worth of Reference service into more concentrated periods of time is the hazard of reference fatigue, which can be measured as

psychological and physical depletion because of work intensity and worktime. So much energy goes out in answering questions, responding to requests, and negotiating with people on both sides of the counter that the edge wears off and consequently service deteriorates.

The threat may be magnified. For years workers at this library have been coping with substantial blocks of time without crying fatigue. On the weekend and during the evening, three people compose the complete staff. Everyone signs up for a half-semester of weekly evening duty and for about three weekend days a semester. Night work begins at 5 and ends at 9:30, and there is an hour break for dinner. The longest evening stretch worked is three and one-half hours, the longest weekend time block four and one-half hours.

That workers do accept long time blocks does not mean that they remain fresh. Yet no one has suggested that there be relief workers for the weekend. The weekend workers cope with their situation, although some do recognize fatigue. Susceptibility depends on an individual's stamina and resiliency.

But is the night and especially the weekend comparison a fair one? A chief determinant of fatigue is intensity of activity. That is composed of both time and energy expenditure in any client transaction. Effort is expended on such behaviors as social interaction, courtesy, interviewing, analysis, and request-fulfilling. Type of client, type of request, and number of

requests all are variables. There are less questions on a weekend day, but there are also less staff, so the proportion of librarian to questioner does not change. It is not possible to say that weekend questions are any less difficult than day questions, and so less tiring.

Less staff makes for less time flexibility. Workers do not have the psychological luxury of knowing they could call a substitute from another part of the building, because they constitute the whole skeleton crew. The objections to reference depletion should, if anything, be greater for weekend work than weekday.

For the past eighteen months the Reference Center has kept statistics of client contacts -- instructional and directional questions, CD-ROM and online catalog assistance, telephone requests, interlibrary loan transactions and FAX messages. Using thirty days per month and 13.5 hours of operation per day as the standard, there were an average of 215 client contacts per day, or approximately sixteen contacts per hour.

Since there are on average more week day questions than weekend questions, the energy expenditure is greater. However, a good reference librarian will also draw energy from the questioner, feel energized by the reference process (even when an answer is not found), and be buoyed up when the client gives that occasional "thank you." The wear and tear is mitigated or counterbalanced.

A team that opts for a full day's reference duty need not have a full day's activity in answering reference questions. A day may have a relatively small ratio of client to librarian interaction. Factors affecting that include time of day, advancement of semester, and the weather. Likewise, some client interaction is more rewarding and refreshing than other; and reference duties are not confined to answering reference questions.

During a four hour time block, two out of a four person team may be on duty. In theory this means that each person could work the same amount, two hours. However, for the sake of continuity, one person should be there the full span and each of the other three will work one hour and twenty minutes. The person working the full span, the team leader, is most seriously threatened with duty fatigue.

The sake of continuity is not the only reason for this risk. The leader is most responsible for the Reference Center and should be there longer than anyone else. However, advantages of this position offset fatigue or its passive ally, monotony. An overextended leader has the freedom to re-delegate responsibilities, take a recuperative break, or vary a day's activities. Also, a sense of duty increases incentive to carry out responsibilities.

Compared with the past, amount of time at the Reference Center decreases under this arrangement. In a week's period

a worker could spend at most eight hours, but for everyone except the leader the time would probably be less. It depends on the level of business at the Reference Center for those two four-hour slots.

Conclusion

The purpose of a reference team concept is improvement of the current system. Currently, both librarians and paraprofessionals at the Reference Center work a variety of shifts each day. Individuals normally work no more than two and one-half hours daily and there is a limit of three people at one time. There are weaknesses in this system. The scheduling of the Reference Center is not fair and equitable to all concerned, including the client. An ambiguity in leadership impedes decision-making at the Center, and without supervision the Reference Center runs the risk of uncoordinated, discrete activities. Furthermore, frequent daily personnel changes, militates against a group identity and sows miscommunication.

One major concern is that clients are not given the best standard of service because at times the Reference Center may be over-staffed or under-staffed. Expectation of encountering either condition weakens a worker's incentive to appear; the former because of the feeling the worker is unneeded, and the latter because of the dread of reference fatigue.

Would a team staff the Reference Center better? Possibly. Will it ever be implemented? Perhaps. But if that is to take place, then the majority of staff members must support it, and five individuals must step forward to serve as team leaders. Only a few library faculty are interested in taking on the role of being a team leader and adopting the "team approach" to staffing the Reference Center. These individuals must work harder and longer so that their teams will provide the best possible reference service to clients. They must supervise their teams during the scheduled work time, coordinate training efforts, recruit substitutes when they are needed, produce a timetable of breaks for each member, and evaluate the team members after the end of each semester.

Besides responsibilities, a major concern of a team leader is the possibility of experiencing reference fatigue. Yet, fatigue is an unlikely occurrence if a team leader is highly motivated and accepts the concept that a team approach is a better way to manage personnel.

A speculative reflection, the team concept has yet to be put into practice at this institution. The model must be tested before any judgement can be made about its effectiveness or how it compares with the present system. Yet, team playing appears especially beneficial to a reference situation. Reference work is done in public.

Harmony and cooperation between workers communicates itself to clients through efficiency and through attitude. A team approach may reinvigorate reference work through an introduction of new strengths, such as educating toward management. Teams promise a fresh force in reference effectiveness.

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Figure 1

Week 1

	Monday	Tuesday	Wednesday	Thursday	Friday
8-12	Team 1	Team 2	Team 3	Team 4	Team 5
12-4	Team 4	Team 5	Team 1	Team 2	Team 3

Week 2

	Monday	Tuesday	Wednesday	Thursday	Friday
8-12	Team 5	Team 1	Team 2	Team 3	Team 4
12-4	Team 3	Team 4	Team 5	Team 1	Team 2

Week 3

	Monday	Tuesday	Wednesday	Thursday	Friday
8-12	Team 4	Team 5	Team 1	Team 2	Team 3
12-4	Team 2	Team 3	Team 4	Team 5	Team 1